

**DEPARTMENT OF HEALTH AND FAMILY SERVICES  
DIVISION OF HEALTH CARE FINANCING  
ADMINISTRATOR'S MEMO SERIES**

**NOTICE:** 03-02

**DISPOSAL DATE:** Ongoing

**RE: 2003 REQUIRED  
TRAINING FOR INCOME  
MAINTENANCE (FOOD  
STAMPS, MEDICAID) STAFF**

To: County Departments of Human Services Directors  
County Departments of Social Services Directors  
Tribal Chairpersons/Human Services Facilitators  
Tribal Economic Support Directors

From: Mark B. Moody  
Administrator  
Division of Health Care Financing

## **PURPOSE**

The purpose of this memo is to provide information regarding training requirements for Income Maintenance (IM) workers for calendar year 2003. Responsibility for professional education for IM staff shifted to the Department of Health and Family Services (DHFS), Division of Health Care Financing (DHCF) with the transfer of the Food Stamp Program and IM Administration in July 2002.

## **BACKGROUND**

DHFS requires training for staff administering IM programs in county and tribal agencies. The requirements are based on operational needs as well as §49.33 of the Wisconsin Statutes and new Administrative Rule DWD 23 which became effective on February 1, 2003. Effective February 1, 2003, Administrative Rule DWD 17 pertains only to W-2 workers. DWD 23 dictates training requirements for IM Workers. DWD 23 will be converted to a DHFS rule in the near future with no planned changes to the rule language.

## **INTRODUCTION**

This Administrator's Memo outlines both the initial and the ongoing training requirements for IM workers for calendar year 2003. An **IM worker** is "a person employed by a county or a governing body of a federally recognized American Indian tribe whose duties include determinations or re-determinations of IM program eligibility."

The IM contract between local IM agencies and DHFS defines IM programs as Food Stamp, Medicaid/BadgerCare, Family Care, Caretaker Supplement, and the Funeral and Cemetery Aids Programs.

It is important to make the distinction between a new IM worker and an experienced IM worker.

- “New IM worker” means a person who is employed by a county or tribal agency as an IM worker (including a permanent employee who transfers into an IM worker position) and who has not completed initial IM training (New Worker training).
- “Experienced IM worker” means an IM worker employed by a county, tribal or W-2 agency who has completed initial IM training (New Worker training).

There are some changes in IM training requirements for CY 2003. The following table provides an overview of the key changes with additional information provided in subsequent sections of this memo.

#### SUMMARY OF CHANGES IN IM TRAINING REQUIREMENTS FOR CY 2003

IM Training Requirement	2002	2003
<b>NEW WORKER</b>		
New Worker Requirements	Completion of New Worker training must occur within first 6 months of hire.	No change.
Professional Development and ECM Training Requirements for New Workers	If a worker completes New Worker training in the first half of a calendar year, an additional six hours of professional development and six hours Enhanced Case Management (ECM) is required;  if a worker completes New Worker training during the second half of a calendar year, there are no additional requirements for professional development or ECM for that calendar year.	For a worker who completes New Worker training, there are no additional requirements for professional development or ECM for the remainder of that calendar year, regardless of when in the year the New Worker Training is completed.
<b>EXPERIENCED WORKERS</b>		
Professional Development Requirements	12 hours	No change
Enhanced Case Management Requirements (ECM)	12 hours	There is no longer an ECM requirement.
<b>NEW POLICY AND REFRESHER TRAINING</b>		
Mandatory Training	If a training session/course is identified by the Department, impacted and identified workers must attend training.	If a training session/course is identified by the Department as mandatory, the Department will also identify the local staff required to attend this training.  Six out of the required 12 hours of professional development training may be met by attending mandatory training.
Non-mandatory Training	If a training session/course is not identified by the Department as mandatory training, training hours may count as part of the professional development or ECM requirements.	If a training session/course is not identified by the Department as mandatory training, training hours may count as part of the professional development requirements. (There is no longer an ECM requirement for IM workers.)

## **RESPONSIBILITIES OF THE STATE**

The goal of training is to support local agencies as they administer the IM programs. Based on training requirements defined by DHFS for the IM Programs, DWD and DHFS will work together to support the development and delivery of quality training services.

This year will be a transition year for state agency responsibilities related to training. Throughout the year, DHFS will be working with DWD's Division of Workforce Solutions (DWS) Bureau of Partner Services (BPS) and local agencies, including a newly formed Training and Technical Assistance subcommittee of the Income Maintenance Advisory Committee (IMAC), to ensure that relevant and high-quality professional training and education are provided for IM staff.

DHFS training priorities for 2003 are to address the need for Food Stamp error reduction and support the implementation of the SeniorCare pre-printed review process.

In an effort to minimize the amount of time and travel associated with training requirements for IM workers, DHFS will strive to optimize opportunities for distance learning while maintaining the right balance between face-to-face training and distance learning techniques.

## **RESPONSIBILITIES OF IM AGENCIES**

*IM Agency Training Liaisons.* Each county or tribal agency must designate an Agency Training Liaison (ATL), as a point of contact for IM training issues. The role of the ATL will be to work with the State to coordinate IM training activities and issues. The ATL is not required to be a trainer. It is the agency's responsibility to report changes in personnel that affect this ATL designation.

*General Professional Education and Training.* Local agencies will be responsible for the general professional education and training of their employees. It is the local agency's responsibility to ensure that their staff have the necessary skills to perform their job functions. County or tribal agencies are responsible for:

- Ensuring that all IM and related staff complete the prescribed Department training;
- Ensuring that new and experienced IM workers are trained in a timely manner on all IM and related programs policy, procedure and automated system updates that are issued by the Department;
- Ensuring that subcontracted staff are adequately trained and notified of all relevant training opportunities;
- Ensuring that the agency supplements Department training to meet the specific needs of the agency and its workers, including training on local processes;
- Maintaining records of staff training such as the date and type of training attended (the DWS/BPS Training Section will maintain files of DHCF/DWS sponsored training);
- Establishing an ongoing method of assessing and documenting staff training needs; and
- Ensuring staff is computer literate in personal computers and word processing software. (The Department recommends working with local technical colleges and private providers as appropriate to meet these training needs.)

## **NEW IM WORKERS**

All workers employed by an IM agency must complete the New Worker training program. The IM agency shall ensure that each new IM worker completes the Department's initial training

during the first 6 months of employment, as required under DWD 23.03(1), to the extent that training is made available. DHFS and DWD intend to provide sufficient opportunities for this learning to occur. Completion of the New Worker program requires involvement and participation in all appropriate instructional activities. The modules contain the knowledge and skill areas needed to assist workers in successfully understanding the administration of the Food Stamp, Medicaid, and other related programs. Also incorporated into these training modules are topics designed to help the worker meet performance and quality assurance standards. The IM agency shall develop evaluation strategies to ensure that the new IM worker achieves a minimum standard of competence [see DWD 23.03(2)].

An IM agency that chooses not to participate in the Department sponsored New Worker training shall develop a plan to implement the standardized new worker curriculum developed by the Department. The implementation plan shall be submitted to the DWS Training Section for approval at least 45 days before the planned start date of training when it is first offered, and annually thereafter. One of the key criteria for approving an agency's request to administer the standardized curriculum is the availability of an employee assigned full-time to staff training responsibilities. Specific requirements of the plan are described in DWD 23.04(2). Contact the DHCF/ Bureau of Health Care Eligibility (BHCE) IM Training Coordinator, Theresa Fosbinder, at [fosbitl@dhfs.state.wi.us](mailto:fosbitl@dhfs.state.wi.us) with questions regarding the required elements of the plan.

## **EXPERIENCED IM WORKERS**

### *Professional Development Requirement*

A minimum of twelve hours of professional development are required on an annual basis for all experienced IM workers and supervisors. Professional development includes, but is not limited to, the following:

- DWS Enhanced Case Management (ECM) courses;
- Conferences, technical college courses, seminars, workshops, etc.; and
- New and refresher policy and procedure training.

This professional development training is not limited to training conducted by Department staff. The county or tribal agency will select the appropriate professional development training for each worker and maintain records to document that this requirement has been met. Agencies will have full discretion regarding the training that fulfills this requirement for each employee. However, training records (as described later in this memo) must be maintained to document completion.

Up to six of the 12 required hours of professional development for an individual may be met by attending training sessions that are indicated as mandatory by the Department for an individual. All DHFS training announcements will indicate whether the session is mandated by the Department.

It is important to note the following changes in the professional development requirement from previous years:

- Although DWS ECM courses may count toward the IM professional development requirement, ***there is no longer a separate requirement for ECM credits for IM workers.***
- Since there is no longer a separate ECM requirement for IM, the only hours required for IM are the 12 professional development hours.
- If workers administer a combination of the W-2 program and one or more of the IM programs, the 12 hours of professional development for IM is not necessarily an additional requirement. The 12 hours for IM may be met by participating in programs that also count toward W-2 professional development or ECM requirements.

- For a worker that completes the New Worker training program *at any time during the calendar year*, there are no professional development requirements for that individual for the remainder of that calendar year regardless of when in the year the New Worker Training is completed.

DHFS is working with DWD to ensure technical, programmatic and soft skills courses appropriate for IM workers are offered in 2003. IM offerings planned for March - June, 2003 are those included in the following table:

ACTIVITY NAME	TYPE OF ACTIVITY
Application Processing	Training sessions
SeniorCare Pre-Printed Review Form Training and Support	Training and on-site support for SeniorCare Central Application Processing Operation (CAPO)
"Working 9 to 5 – Not" and "KIDS to CARES to Case Comments"	Training sessions; Follow up Labs
Alerts/Data Exchange	Web self study guides
Fantastic 4 PAC	Individual assistance
Aliens/Migrants	Training sessions
FS Medical Expenses	Training sessions

IM training priorities and programs for July through December 2003 and beyond are being identified and developed and will be finalized with input from the IMAC Training and Technical Assistance subcommittee.

## **ALL IM WORKERS**

### *New Policy and Refresher Training*

As new policy is developed and implemented, affected workers must be given the knowledge to administer it appropriately. New policy training sessions may be designated on training announcements as mandatory for all staff or just for certain types of staff. In addition, refresher training may be identified as required training based upon Department decisions and standards. Training announcements will identify the mandatory programs and which workers are required to attend.

### *Waivers and Training Equivalencies*

Reasonable, justified proposals to waive individual training program requirements, or approve training equivalencies will be accepted. Because of the flexibility provided under the new professional development requirements, it is expected that proposals of this nature are likely to consist of requests for local agencies to do their own mandatory (refresher or new policy) training (see the procedure for new worker training waivers earlier in this memo). If an IM agency desires a waiver, it must submit a waiver/equivalency request outlining the reasons for the request to the DHCF/BHCE IM Training Coordinator, Theresa Fosbinder, at [fosbitl@dhfs.state.wi.us](mailto:fosbitl@dhfs.state.wi.us). The proposal must include documentation, such as training course outlines, course materials, curriculum guides, and/or documentation of equivalent experience. If the waiver is related to substituting another training program or experience for a training requirement, the proposal must detail how that curriculum/experience accomplished the objectives of the training program. Waivers will be reviewed on a case by case basis. A decision will be communicated no later than 30 days from the date of receipt of the request. Waiver requests must be submitted at least 45 days before the first day of the planned training.

### Training Records

Each IM agency is required to keep records of all training attended by each worker. The records must be maintained in an automated system that can sort by both training participant and training program information. At a minimum, the categories of information collected should include the participant name and title, name of training program, date of program, number of hours attended, and sponsoring organization. If a training program has been approved for waiver/equivalency, that should also be indicated.

The DWS/BFS Training Section will monitor training records. The monitoring activities will include attention to training requirements and the maintenance of training records.

The DWS/BFS Training Section will also maintain training records for workers who attend DHCF and DWS sponsored programs.

## **SUMMARY OF IM PROFESSIONAL EDUCATION REQUIREMENTS**

The following is an outline of requirements for both new and experienced IM workers:

### New Workers

1. New Worker training program
2. Mandatory new policy and refresher training specific to job functions and duties

### Experienced Workers

1. Professional development training (12 hours)
2. Mandatory new policy and refresher training specific to job functions and duties, which can count for a maximum of 6 hours towards the professional development training requirement.

**REGIONAL OFFICE CONTACT: DHFS Area Administrators**

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